FI$CAL W2 PRIMAVERA PROJECT MANAGEMENT WORKSHOP

DATE: MONDAY, FEBRUARY 9, 2015
TIME: 1:00 PM TO 4:00PM
LOCATION: 2000 EVERGREEN STREET, SACRAMENTO
ROOM: JADE AUDITORIUM

Facilitators:	Jenna Byrd Aparna Sharma
Meeting Purpose:	Informational
Type of Meeting:	Question and Answer

AGENDA TOPICS/MINUTES

#	Topic *[Brief description]*	Presenter *[Name]*	Duration *[Time in Min.]*
1	FI$Cal Project Overview	Alex Malana	**5 minutes**
2	Primavera Overview	Jenna Byrd	**15 minutes**
3	P6 Scheduling Resources	Aparna Sharma	**35 minutes**
4	PCM Project Management	Jenna Byrd	**15 minutes**
5	Change Impact Tool / Role Mapping	Stephen Britcher	**5 minutes**
6	BUSN220c Configuration Tasks	Aparna Sharma & Jenna Byrd	**30 minutes**
7	Next Steps	Stephen Britcher	**5 minutes**

QUESTIONS AND ANSWERS

Question	Answer
PC to P6 Integration Option 1	
Q1: What does WBS mean?	A1: It means Work Breakdown Structure. Wikipedia defines WBS as "A hierarchical and incremental decomposition of the project into phases, deliverables and work packages. It is a tree structure, which shows a subdivision of effort required to achieve an objective; for example a program, project, and contract. In a project or contract, the WBS is developed by starting with the end objective and successively subdividing it into manageable components in terms of size, duration, and responsibility (e.g., systems, subsystems, components, tasks, subtasks, and work packages) which include all steps necessary to achieve the objective."

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Question	Answer
Schedule a Project Overview	
Q2: DGS handles different projects; are there criteria for what type of projects we can use in Primavera?	A2: No, there are no criteria. You can use Primavera for any type of project you would like. The department will make the decision which project to integrate with Primavera P6.
Q3: Is this more for contract managers to track projects more easily?	A3: The project will sit in both applications (Primavera P6 and PeopleSoft PC Project Costing), but there is no cost in P6. Right now, the costs are managed in the PeopleSoft PC module.
Q4: Can PeopleSoft track change orders?	A4: Yes, it does. There is content in the Project Costing (PC) Business Process Workshop (BPW) that can give you more information.

Question	Answer
Scenario 1 – Schedule a Project	
Q5: Do you have a list of things P6 will capture? So we could determine if we should use this.	A5: Yes. The key terms list everything. Right now, P6 its schedule and resources (funds). Primavera Contract Management (PCM) is to track document management. We will talk more about this later in this presentation.
Q6: Are the categories and sub-categories much the same as in the project module?	A6: Yes
Q7: P6 calculates information based on what?	A7: Based on the detail that you key into P6.
Scenario 2 – Manage Resources	
Q8: Can you assign resources to two different roles?	A8: Yes, you can assign more than one role to a resource. The FI$Cal Project has compiled a list of role combinations that should not be assigned to the same person, based on the Separation of Duties requirements in Section 8080 of the California State Administrative Manual (SAM).
Q9: Can you put a percentage?	A9: When you assign an activity to a resource, the activity will have a start and end date, and can have a plan cost and activity cost. All of activity is the total cost; you can establish an unlimited number of roles
Q10: If I have a list of (labor) resources that are available now, but in 2 years the resources change. If I pull up a past program, will those earlier resources still show?	A10: Former employees will still appear as a labor resource that was assigned to a specific past project at the time, but they will no longer be selectable as labor resources that can be assigned to new projects.

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Q11: Primavera keeps (labor resource) names from the past, but they do not show up now?	A11: Former employees will still appear as a labor resource that was assigned to a specific past project at the time, but they will no longer be selectable as labor resources that can be assigned to new projects.
Q12: In the Contractor's Schedule Toolkit (CST), how do you link that to your obligations so it will line up to get actual cost?	A12: All of this will be handled in the mapping extension that is currently being designed. It should be updated in Primavera.
Q13: What does "450" represent?	A13: It's the plan cost.
Manage Project Document Overview	
Q14: Can we add additional fields?	A14: Yes, you can ask for some custom fields. The request for new fields is reviewed, and if approved as providing an essential business function for a sufficiently broad number of users to merit the custom development costs, or if the customization is the only way to meet a stated business need that was defined when FI$Cal's system integrator bid on the FI$Cal project (and these new fields are thus *not* an extra-cost customization), then the custom fields will be located in a custom tab. You can put the custom fields at the business item level or at the document level.
Q15: Does it cost to have custom fields added?	A15: As a general rule, if a custom field is required in order for the System to meet a State business requirement that was spelled out in the State's requirements (which Accenture bid on as the System Integrator for FI$Cal), and the System cannot meet these requirements without the customization, then no, there is no extra cost for the customization. If the custom field is an afterthought that was not mentioned in the State's original requirements, or if the original requirement can be met without developing a custom field, then yes, a custom field generally costs extra.
Q16: Is this more for project managers?	A16: Yes, it is one place to store the documents for project management.
Q17: Will accounting have a link when the expenditure is processed?	A17: There's no cost being tracked in P6. It is all the soft project management documentation.
Q18: With the tracking documents with a project, is there a time limit of keeping the documents in FI$Cal? Will all the stuff be there or is there is an archive feature?	A18: The Project is still working on an archive solution and once determined it will be communicated to the departments.

PCM - P6 Roles

Q19: What if we do not want Primavera now, but want it later on down the line?	A19: That is an option. If you do not configure Primavera for Wave 2, you can contact the FI$Cal Service Center (FSC) after Wave 2 Go-Live, to request its use at a later date; but it may not be rolled out for you until a later Wave date.

ACTION ITEMS

None.	